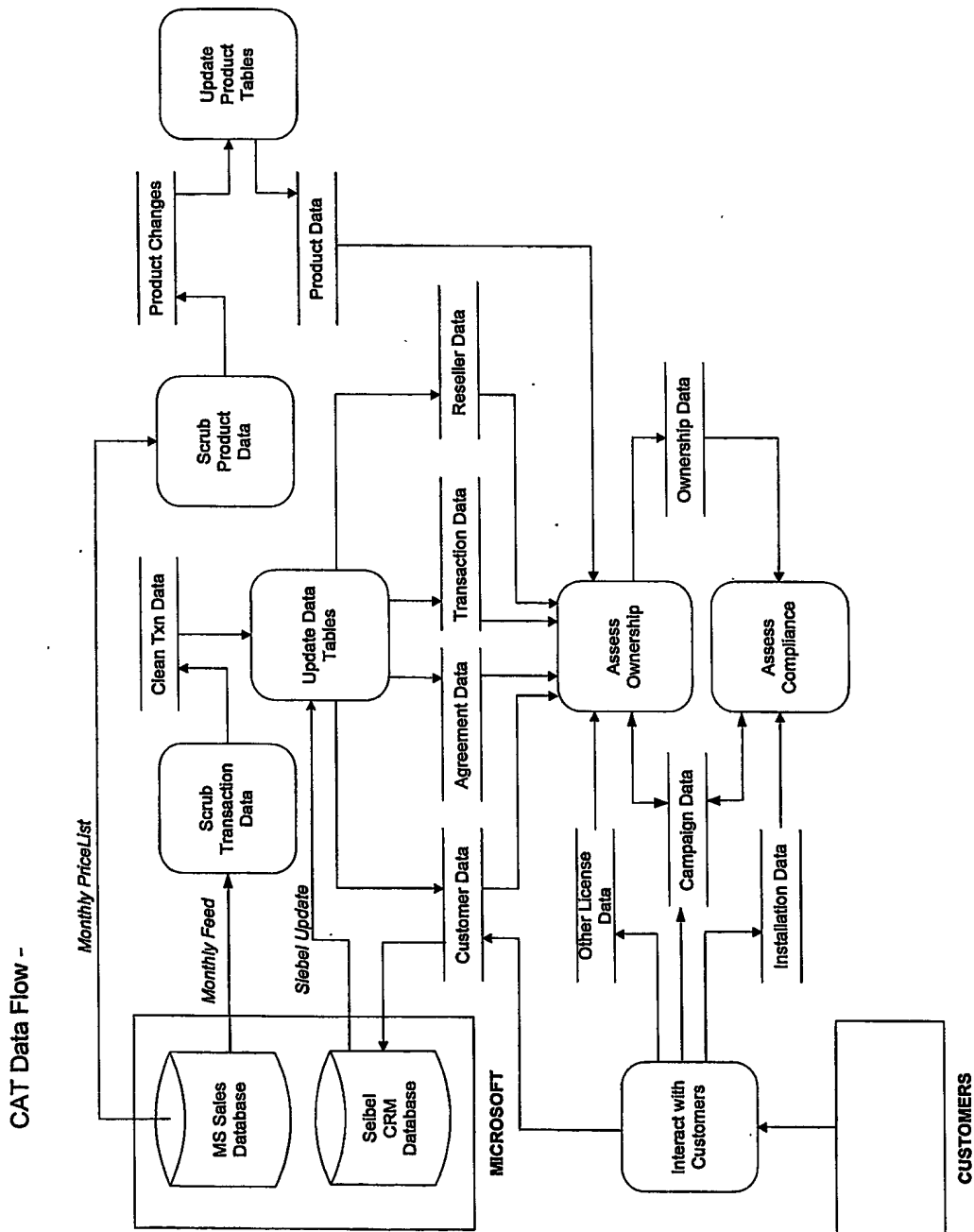


1/32

Figure 1



BEST AVAILABLE COPY

BEST AVAILABLE COPY

https://www.accord.co.nz/CAT_Test/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search History Favorites

Address http://www.accord.co.nz/CAT_Test/CAT.asp

COMPLIANCE ANALYSIS TOOLSET 1112117 - XYZ COMPANY

Upper Mid-Market 1 of 104 Choose Customer

Compliance Analysis Toolset Site Map

This Site Map shows the major functions of the CAT system. The Quick Menu displayed to the left provides continuous access to the features activated in this test system. The features listed in the various sections below provide links to active screens in some instances, and in other cases provide a link to a description of how the feature will work when activated.

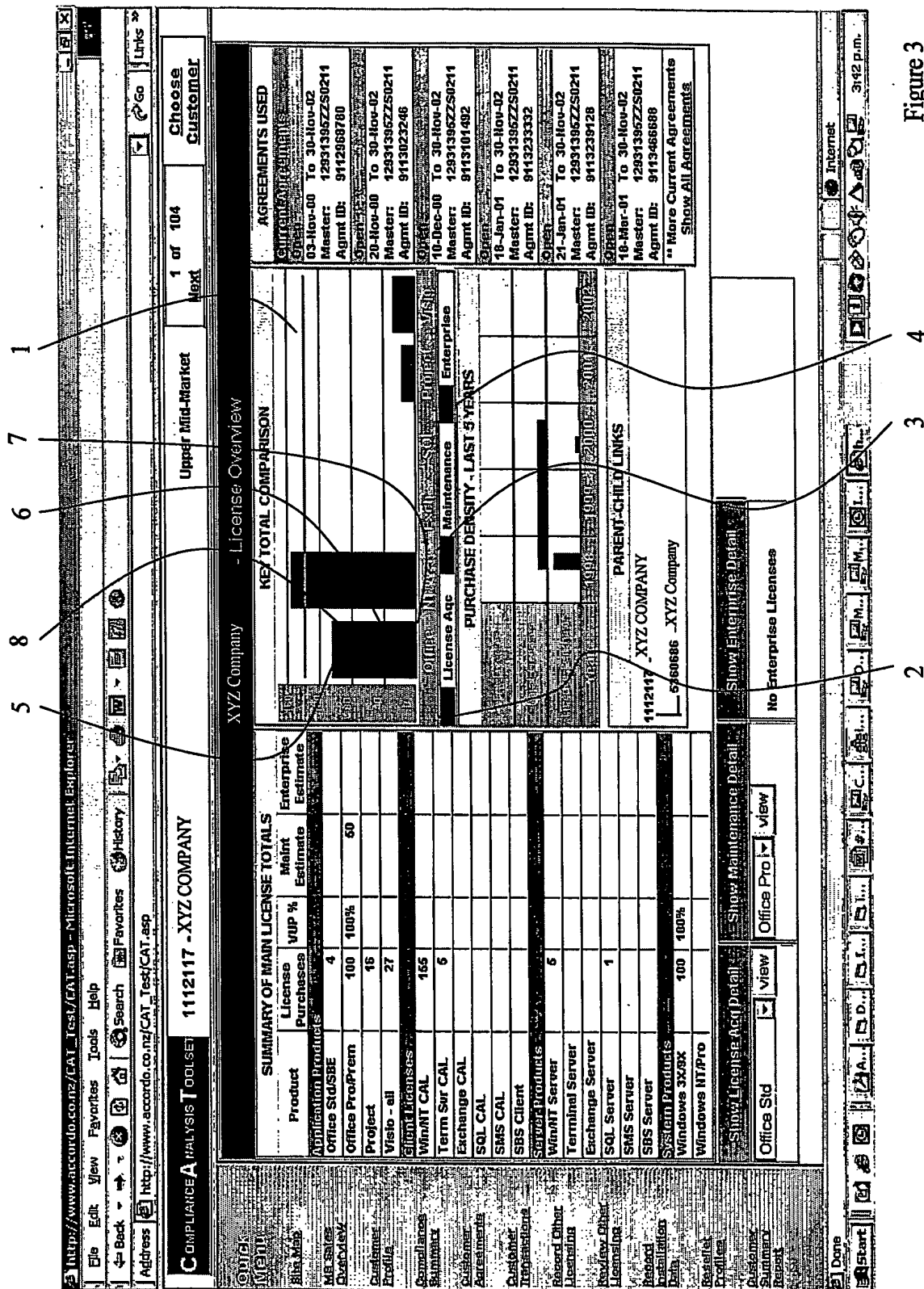
CUSTOMER VIEW	RESELLER VIEW	PRODUCT VIEW	SALES & MARKETING VIEW	OTHER MODULES
MS Sales Overview <i>Key indicators from MS Sales trans</i>	Reseller Overview <i>Key indicators from MS Sales trans</i>	Product List <i>Searchable list of products and release dates</i>	Customer Segment Analysis <i>Comparative analysis of customer segment by product, agreement type etc</i>	Agreement Modelling <i>Tools for capturing customer deployment plans and modelling best agreement options</i>
Customer Profile <i>Customer profile from MS Sales trans</i>	Reseller Analysis <i>In-depth analysis of this reseller</i>	Product Profile <i>Analysis of sales for each product or product family</i>	Agreement Analysis <i>Comparative analysis of agreement type by product, segment, reseller etc</i>	Call Center Workbench <i>Scripts for capturing and overlaying information via call center programs</i>
Compliance Summary <i>Estimate of compliance position</i>	Reseller Reports <i>Various reports on reseller activity</i>	Product Reports <i>Various reports on product transactions</i>	Product Analysis <i>Comparative analysis of product families by customer segment, agreement type etc</i>	Reseller Access <i>Ability for Resellers to access data and views for assigned customers</i>
Transaction List <i>Searchable list of all MS Sales trans</i>	Reseller Administration <i>Linking and other reseller admin</i>	Product Licensing Rules <i>Summary of licensing rules for a chosen product family</i>		Customer Access <i>Ability for customers to review MS Sales transaction analysis</i>
Agreement List <i>Searchable list of all VLM agreements</i>				
Record Other Licensing <i>Ability to record other licensing (e.g. FPP, OEM)</i>				
Review Other Licensing <i>Review and edit other licensing entries</i>				
Record Installation Data <i>Ability to record installation information</i>				
ELP Workbench <i>Modify an Effective Licensing Position</i>				
Review History <i>Review previous compliance activity</i>				
Report on Customers <i>Product various customer reports</i>				
Customer Administration <i>Linking and other customer admin</i>				

Quick Menu
Site Map
MS Sales Overview
Customer Profile
Compliance Summary
Transaction List
Agreement List
Record Other Licensing
Review Other Licensing
Record Installation Data
ELP Workbench
Review History
Report on Customers
Customer Administration

Internet 3:40 p.m.

Figure 2

3/32



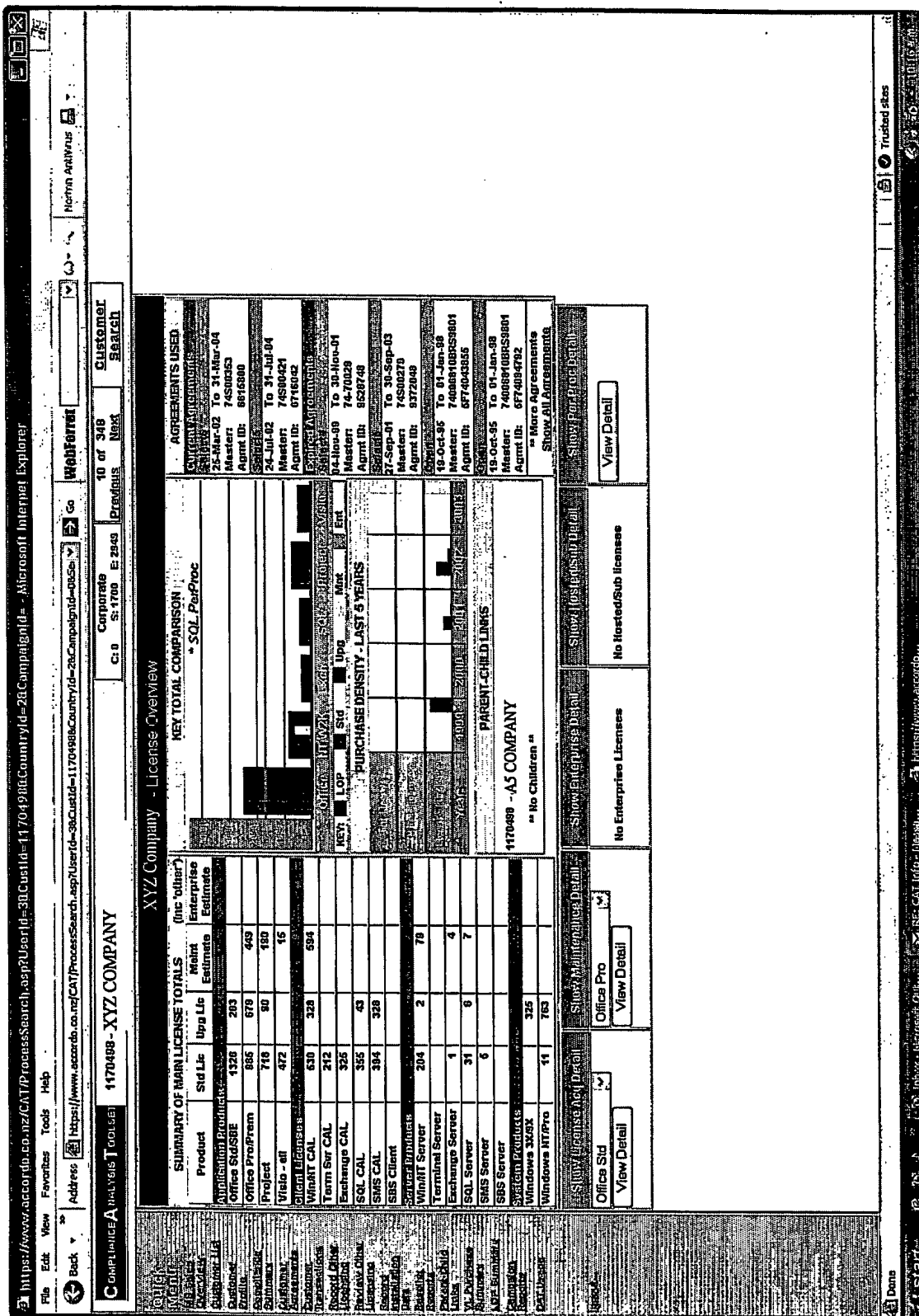


Figure 3A

http://www.accordo.co.nz/CAT_Test/CAT.asp - Microsoft Internet Explorer

File

Edit

View

Favorites

Tools

Help

Back

Forward

Search

Favorites

History

Address

http://www.accordo.co.nz/CAT_Test/CAT.asp

COMPLIANCE ANALYSIS TOOLSET

1112117 XYZ COMPANY

Upper Mid-Market

1 of 104

Choose Customer

LICENSE OWNERSHIP AND COMPLIANCE SUMMARY

1112117 - XYZ Company

Product	Version	Std Lic	Upd Lic	Maint Accr's	Ent Accr's	Total MS Sales	Other Lic	Total Owned	Total Inst'd	Compl Status	Compliance Display	Est Cost
Office ProBookshelf Bundle	97			50		50		50	20	30		\$9,500
Office Professional	7.00		100			100		100	110	-10		\$0
Office Small Business	2000	4				4	5	9	10	-1		\$0
PowerPoint	2000	4				4		4		4		
Project	2000	16				16		16	34	-18		\$12,924
Publisher	2000	10				10		10	10	0		
SQL Server Standard Edition	2000	1				1	2	1	1	0		
Visio Enterprise	2000							2	2	2		
Visio Professional	2000	13				13		13	22	-9		\$7,578
Visio Professional	2002	3				3		3	6	-3		\$2,626
Visio Standard	2002	11				11		11	9	2		
Visual FoxPro Professional	6.00	1				1		1	1	0		
Windows 2000 CAL	2000	5				5	10	15	44	-29		\$1,798
Windows 2000 Professional	2000						95	95	142	-47		\$18,263
Windows 2000 Server	2000	5				5		5	5	0		
Windows 2000 Terminal Services CAL	2000	5				5		5	5	0		
Windows 95	95											
Windows NT CAL	4.00	150				150		150	150	100		
Windows XP Professional	XP		2			2		2		2		\$52,809
Estimated Non-Compliance Cost												

Object Menu

Site Map

MS Sales Overview

Customer Profile

Compliance Summary

Customer Agreements

Customer Transactions

Record Other Licenses

Review Other Licenses

Record Installation Data

Reliability Profiles

Customer Summary Report

Done

Start

Internet

3:43 PM

Figure 4

6/32

http://acpower/CAT_DEV/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Home Media

Favorites

Print

Stop

Home

Media

Print

Stop

Home

Media

Print

Address http://acpower/CAT_DEV/CAT.asp

COMPLIANCE ANALYSIS TOOLSET 5671830 - XYZ COMPANY

Small Business C: 40 S: 23 P: 23

6 of 23 Previous Next

Choose Customer

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Figure 4A

http://accpower/CAT_DEV/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

BackForwardStopHomeSearchMediaFavoritesHistoryPrintGoLink

Addresshttp://accpower/CAT_DEV/CAT.asp

COMPULSIVE ANALYSIS TOOLSET

2263186 - XYZ Company

Upper Maint - Maint - Ent - Total - Family

C 0 S 300 3 340 Prev/Outs Next

Choose Customer

2263186 - XYZ Company

LOP PRODUCT OWNERSHIP SUMMARY

LOP calculated on 16-Apr-03

Product	Version	Std Lic	Upd Lic	Upd Lic	Maint	Ent	Maint	Ent	Upd	Maint	Ent	Total	Family	Show LOP Deriv.
					Acct's	Acct's	Acct's	Acct's	Acct's	Acct's	Acct's	Acct's	Acct's	Derivation
Exchange CAL	2000				340							340	0	Derivation
Exchange Server - Enterprise	2000	1			1							1	2	Derivation
Exchange Server - Standard	2000				2							0	2	Derivation
FrontPage	2000	5										5	0	Derivation
	2002	3										3	0	Derivation
Office	2000	80			40							120	0	Derivation
	XP	26			5							31	0	Derivation
Office Developer	2000	1										1	0	Derivation
Office Professional	2000											0	2	Derivation
	XP				40							40	0	Derivation
Project	2000	2										2	0	Derivation
	2002	6			10							16	0	Derivation
Publisher	2002	1										1	0	Derivation
SOL CAL	7.00	6										6	0	Derivation
SOL Server Standard Edition	2000	8			3							11	0	Derivation
Visual Basic Enterprise	6.00	1										1	0	Derivation
Visual SourceSafe	6.00	23			1							24	1	Derivation
Visual Studio .NET Ent Developer	6.00	1										1	0	Derivation
Visual Studio .NET Professional	6.00	2										2	0	Derivation

http://accpower/CAT_DEV/CAT.asp

File Edit View Favorites Tools Help

BackForwardStopHomeSearchMediaFavoritesHistoryPrintGoLink

Addresshttp://accpower/CAT_DEV/CAT.asp

COMPULSIVE ANALYSIS TOOLSET

2263186 - XYZ Company

Upper Maint - Maint - Ent - Total - Family

C 0 S 300 3 340 Prev/Outs Next

Choose Customer

2263186 - XYZ Company

LOP PRODUCT OWNERSHIP SUMMARY

LOP calculated on 16-Apr-03

Product	Version	Std Lic	Upd Lic	Upd Lic	Maint	Ent	Maint	Ent	Upd	Maint	Ent	Total	Family	Show LOP Deriv.
					Acct's	Acct's	Acct's	Acct's	Acct's	Acct's	Acct's	Acct's	Acct's	Derivation
Exchange CAL	2000				340							340	0	Derivation
Exchange Server - Enterprise	2000	1			1							1	2	Derivation
Exchange Server - Standard	2000				2							0	2	Derivation
FrontPage	2000	5										5	0	Derivation
	2002	3										3	0	Derivation
Office	2000	80			40							120	0	Derivation
	XP	26			5							31	0	Derivation
Office Developer	2000	1										1	0	Derivation
Office Professional	2000											0	2	Derivation
	XP				40							40	0	Derivation
Project	2000	2										2	0	Derivation
	2002	6			10							16	0	Derivation
Publisher	2002	1										1	0	Derivation
SOL CAL	7.00	6										6	0	Derivation
SOL Server Standard Edition	2000	8			3							11	0	Derivation
Visual Basic Enterprise	6.00	1										1	0	Derivation
Visual SourceSafe	6.00	23			1							24	1	Derivation
Visual Studio .NET Ent Developer	6.00	1										1	0	Derivation
Visual Studio .NET Professional	6.00	2										2	0	Derivation

Figure 5

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http://www.accordo.co.nz/CAT_Test/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://www.accordo.co.nz/CAT_Test/CAT.asp

Back Forward Stop Reload Home Favorites History

COMPLIANCE ANALYSIS TOOLSET 1112117 - XYZ COMPANY

Upper Mid-Market 1 of 104 Next

Choose Customer

Listing Of All Agreements Used

Customer Agreement Status Program Master Agreement show agmts

Reseller Start Date from End Date to Agreement ID reset

Customer	Master	Agmt ID	Agmt ID	Start
OPEN LICENSE - Expired	83011025BAS9904	Agmt ID: 5F83013799		Start: 30-Jan-97
OPEN LICENSE - Expired	83011049BSS9904	Agmt ID: 5F83013812		Start: 30-Jan-97
OPEN LICENSE - Expired	11006766AKS0007	Agmt ID: 9111019594		Start: 29-Jul-98
OPEN LICENSE - Expired	11006776AAS0007	Agmt ID: 9111019597		Start: 29-Jul-98
OPEN LICENSE - Expired	83011025BAS9904	Agmt ID: 9111368009		Start: 02-May-99
OPEN LICENSE - Expired	12448566ZZS0205	Agmt ID: 9112482051		Start: 25-May-00
OPEN LICENSE - Current	12931395ZZS0211	Agmt ID: 9112968780		Start: 03-Nov-00
OPEN LICENSE - Current	12931395ZZS0211	Agmt ID: 9113023246		Start: 20-Nov-00
OPEN LICENSE - Current	12931395ZZS0211	Agmt ID: 9113101492		Start: 10-Dec-00
OPEN LICENSE - Current	12931395ZZS0211	Agmt ID: 9113233332		Start: 18-Jan-01
OPEN LICENSE - Current	12931395ZZS0211	Agmt ID: 9113239128		Start: 21-Jan-01
OPEN LICENSE - Current	12931395ZZS0211	Agmt ID: 9113466688		Start: 18-Mar-01
OPEN LICENSE - Current	12931395ZZS0211	Agmt ID: 9113486304		Start: 21-Mar-01
OPEN LICENSE - Current	12931395ZZS0211	Agmt ID: 9113602771		Start: 17-Apr-01
OPEN LICENSE - Current	12931395ZZS0211	Agmt ID: 9113681083		Start: 08-May-01
OPEN LICENSE - Current (4900110)	12931395ZZS0211	Agmt ID: 9113954549		Start: 17-Jul-01
OPEN LICENSE - Current	12931395ZZS0211	Agmt ID: 9114248162		Start: 07-Oct-01

Done

Start Stop Print View Full Screen Help

Internet 3:44 p.m.

Figure 6

11/32

http://www.accordco.co.nz/CAT_Test/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address http://www.accordco.co.nz/CAT_Test/CAT.asp

COMPLIANCE ANALYSIS TOOL SET 1112117 - XYZ COMPANY

Upper Mid-Market 1 of 104 Choose Customer

STEP 1 OF 3

SELECT PRODUCT TYPE

Applications

☐ Office
☐ Project
☐ Visio
☐ Languages
☐ Single Applications

Systems

☐ NT/Windows
☐ Exchange
☐ SQL
☐ SMS
☐ BackOffice
☐ Terminal Server
☐ Small Business Server
☐ Other Server

Windows
☐ Other Systems

NEXT ->

STEP 2 OF 3

REFINE SELECTION

Office Variations

☒ Office
☐ Office Mac
☐ Office Small Business
☐ Office Professional
☐ Office Premium
☐ Office Pro Special Edition
☐ Office ProBookshelf
☐ Office ProBookshelf/WFoxPro
☐ Office Pro/WFoxPro
☐ Office Developer

NEXT ->

FINAL STEP

SELECT VERSION AND RECORD DETAILS

1. Enter your name without this, nothing will be recorded

Your name (e.g. John Smith)

2. Choose Version

Record quantity applied and Date of Acquisition

Enter quantity and date

3. Select License type

☐ Standard License ☐ Version Upg ☐ Competitive Upg ☐ Product Upg
☐ Maintenance (incl UA or SA) - also need End Date

4. Select Method of License Acquisition

☐ Full Package Product (PPP) ☐ OEM
☐ License Transfer ☐ Gifted (add explanation below)
☐ Technology Guarantee ☐ Other (add explanation below)

5. Proof of Purchase Confirmation

☐ Confirmation not sighted ☐ Proof of Purchase confirmed

6. Add Explanation Notes

RECORD DATA RESET FORM

Figure 7

<http://www.accordo.co.nz/CAT.asp> - Microsoft Internet Explorer

[File](#) [Edit](#) [View](#) [Favorites](#) [Tools](#) [Help](#)

[Back](#) [Forward](#) [Search](#) [History](#)

Address http://www.accordo.co.nz/CAT_Test/CAT.asp

COMPLIANCE ANALYSIS TOOLSET

112117 - XYZ COMPANY Upper Mid-Market 1 of 104 Choose Customer

112117 - XYZ Company All Licenses Acquired by Other Means

Customer: Product: Method: Proof of Purchase:

Enterer: Date From: Date To: License Type:

Enterer	Product	Status	Date	Package
112117	Visio Enterprise	2000	Standard License	2 01-Jan-02 Full Package (FPP)
Enterer:	WJ (on 23-Oct-02)	Status: Not Confirmed	Notes:	
112117	Windows 2000 CAL	2000	Standard License	10 01-Jan-02 Full Package (FPP)
Enterer:	WJ (on 23-Oct-02)	Status: Not Confirmed	Notes:	

[Home](#) [MS Setup Overview](#) [Customer Profile](#) [Compliance Summary](#) [Customer Address](#) [Customer Transitions](#) [Review Other Licenses](#) [Review Other Licenses](#) [Review Installation Data](#) [Reseller Profiles](#) [Customer Summary Report](#)

Done Start Internet 3:45 p.m.

Figure 8

13/32

Internet Explorer - Microsoft Internet Explorer

Address: http://www.accordo.co.nz/CAT_Test/CAT.asp

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

COMPLIANCE ANALYSIS TOOLSET 1112117 - XYZ COMPANY

Upper Mid-Market 1 of 104 Choose Customer

Next

STEP 1 OF 3

SELECT PRODUCT TYPE

Applications

☐ Office

☐ Project

☐ Visio

☐ Languages

☐ Single Applications

Server

☐ NT/Windows

☐ Exchange

☐ SQL

☐ SMS

☐ BackOffice

☐ Terminal Server

☐ Small Business Server

☐ Other Server

System

☐ Windows

☐ Other Systems

NEXT →

STEP 2 OF 3

REFINE SELECTION

Office Applications

☐ Office

☐ Office Mac

☐ Office Small Business

☐ Office Professional

☐ Office Premium

☐ Office Pro Special Edition

☐ Office ProBookshelf

☐ Office ProBookshelf/WordPro

☐ Office Pro/WordPro

☐ Office Developer

NEXT →

FINAL STEP

EDIT INSTALLATION QUANTITIES

The table shows the selected products and the current recorded installation quantity for each. This quantity can be updated by amending the appropriate entry and pressing the 'UPDATE QUANTITY' button.

Choose Product Version	UPDATE QUANTITY	RESET FORM

Done Start

Internet 3:45 p.m.

Figure 9

14/32

http://www.accordo.co.nz/CAT_Test/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search History Favorites

Address http://www.accordo.co.nz/CAT_Test/CAT.asp

Go Links

Compliance Analysis Toolset

Reseller View

Return to Customer View

Show Children

List of Resellers

Group Alphabetically Agreement Type Customer Type Active From Search for

Show All Show All Show All Jul-96 display reset

12	A1 COMPANY	First Txn	Last Txn	Customer Types	Total Cus:	1	Total Agmts:	17	Product Pools	View Profile
		23-Dec-00	02-Aug-02	CMM		Open			Apps Surs	
65	A2 COMPANY	First Txn	Last Txn	Customer Types	Total Cus:	15	Total Agmts:	25	Product Pools	View Profile
		30-Jun-00	23-Aug-02	Smb CMM		Open			Apps Surs Sys	
113	A3 COMPANY	First Txn	Last Txn	Customer Types	Total Cus:	1	Total Agmts:	1	Product Pools	View Profile
		28-Sep-01	28-Sep-01	Smb		Open			Product Pools Surs Sys	
119	A4 COMPANY	First Txn	Last Txn	Customer Types	Total Cus:	2	Total Agmts:	2	Product Pools	View Profile
		27-Aug-99	27-Aug-99	CMM UMM		Open			Apps Surs	
143	A5 COMPANY	First Txn	Last Txn	Customer Types	Total Cus:	1	Total Agmts:	1	Product Pools	View Profile
		01-Jan-99	01-Jan-99	CMM		Open			Product Pools Surs	
173	A6 COMPANY	First Txn	Last Txn	Customer Types	Total Cus:	92	Total Agmts:	246	Product Pools	View Profile
		02-Aug-96	23-Aug-02	Smb CMM UMM Corp		Open Sel Ent			Apps Surs Sys	
202	A7 COMPANY	First Txn	Last Txn	Customer Types	Total Cus:	202	Total Agmts:	1058	Product Pools	View Profile
		02-Aug-96	23-Aug-02	Smb CMM UMM Corp Maj		Open Sel Ent			Apps Surs Sys	
247	A8 COMPANY	First Txn	Last Txn	Customer Types	Total Cus:	2	Total Agmts:	4	Product Pools	View Profile
		30-Mar-01	25-Jan-02	CMM Corp		Open			Product Pools Surs	
292	A9 COMPANY	First Txn	Last Txn	Customer Types	Total Cus:	48	Total Agmts:	91	Product Pools	View Profile
		02-Aug-96	16-Aug-02	Smb CMM UMM Corp		Open			Apps Surs Sys	
296	A10 COMPANY	First Txn	Last Txn	Customer Types	Total Cus:	12	Total Agmts:	24	Product Pools	View Profile
		01-Jan-99	26-Apr-02	Smb CMM UMM Corp		Open			Product Pools Surs Sys	

Start Stop Print Refresh Back Forward Home

Internet 3:46 p.m.

Figure 10

15/32

Call center workbench

Microsoft Access - [Call Opening]

File Edit View Insert Format Records Tools Window Help

Cust # 660 XYZ Company

Search: Core Medium Business

Form View

Records: 14 of 91

Start

SQL Server Enterprise... SQL Server Query Au... Microsoft Outlook Microsoft Access

NUM

CALLER NUMBER

Organisation Details

Amended Organisation Name: XYZ Company

Primary Address details

244 Bush Road, Albany

Private Bag 102 922

North Shore Mail Centre

Primary City Auckland

Primary Phone +64093608700

Primary Contact Details

First Name Last name

Graham Crookes

Phone (001)

Email Address

Job Role: IT Manager

Show any Selfbel Data: Selfbel Data

Vertical Industry Classification

Marketing Audience

Influence Level

Special Notes

Action - Customer will complete by mid September.

License details and compliance analysis

License Analysis

Press to proceed to customer interview

Profiling

Log call details

Call Log

Exit

Included (Child) Organisations

License data included with this org'n

XYZ Company

XYZ Company NZ Limited

XYZ COMPANY LTD

Record any further names here...

Add Other Co Names

Call Status Details

Current Call Status

In progress

Record Other Purchases

Other Purchases

Figure 11

16/32

Microsoft Access - [Customer Profiling] File Edit View Insert Format Records Tools Window Help

Type a question for help

Record: 14 of 2 (Filtered)

Form View

SQL Apps and Intranet

Does your org use an Intranet? ☒

If yes, what proportion of users have regular access?

If yes, is anything available via Intranet which uses SQL Server (e.g. phone list)?

Is there any other app, e.g. financial/HR package, which uses SQL? ☒

If yes, please list...

And estimate the number of users accessing SQL in this way

Do you know how the SQL use in these apps is licensed?

Use of Terminal Server

Do any users connect via Terminal Sur (thin clients)?

If yes, approximately how many users connect in this way?

License Analysis Next Page

General Product Use

For each product, indicate the level of use...

Office Std Office Pro

Project Visio

Access Outlook

Network Infrastructure

What do you use as a network infrastructure?

If NT/Win2000 is not used for file/print etc, is it used as an application server? ☒

If yes, how many users access such NT/Win2000 hosted applications?

Of these, how many would access Windows 2000 Server?

Exchange and Outlook

Is Outlook the primary mail client? ☒

Is Exchange the email medium? ☒

Other Purchases

End User Device Profile

Total devices?

Made up of.....

Desktop PCs Distributed across

Notebook PCs

Thin Client Devices sites.

Add any comment on number of seats...

Use of Standard Products

Do you have a std desktop config?

Which typically go on each device?

Office (any type) ☒ NT/Win2K CAL ☒

Exchange ☒ Outlook ☒

SMS ☒ SNA (Host Intgr) ☒

Access ☒ SQL CAL ☒

If there is a std config, how is it deployed?

Growth Forecast

How do you expect user numbers to change over the next 1-2 years?

If you expect a change, by what percentage?

Preferred Purchasing Method

If licenses need to be purchased, what is the preferred method?

Preferred Reseller Account Manager

Windows Desktop O/S

Which desktop o/s is standard?

Do you ever buy PCs without Windows bundled? ☒

If yes, where

Figure 12

17/32

Microsoft Access - [Customer Profiling] File Edit View Insert Format Records Tools Window Help Type a question for help

SMS ☒ SHA (Host Intgrn) ☒ SQL CAL ☒ Access

If there is a std config, how is it deployed?

Exchange and Outlook

Is Outlook the primary mail client? ☒

Is Exchange the email medium? ☒

Other Purchases

License Analysis

Do any users connect via Terminal Sur (thin client)?

If yes, approximately how many users connected in this way? 0

Next Page

Contact

Preferred Purchasing Method

If licenses need to be purchased, what is the preferred method?

Preferred Reseller Account Manager

Summary Notes

Detail any impending licensing expected

\$-Value of Impendings \$0.00

Any final notes (for MS consumption)

Post-call analysis required? ☒

Back to Top

License Analysis

Windows Desktop O/S

Which desktop o/s is standard?

Do you ever buy PCs without Windows bundled? ☒

If yes, where from?

License Transcript

Discuss the License Transcript already received, and note any relevant comments

Other Purchases

Growth Forecast

How do you expect user numbers to change over the next 1-2 years?

If you expect a change, by what percentage?

Future Projects

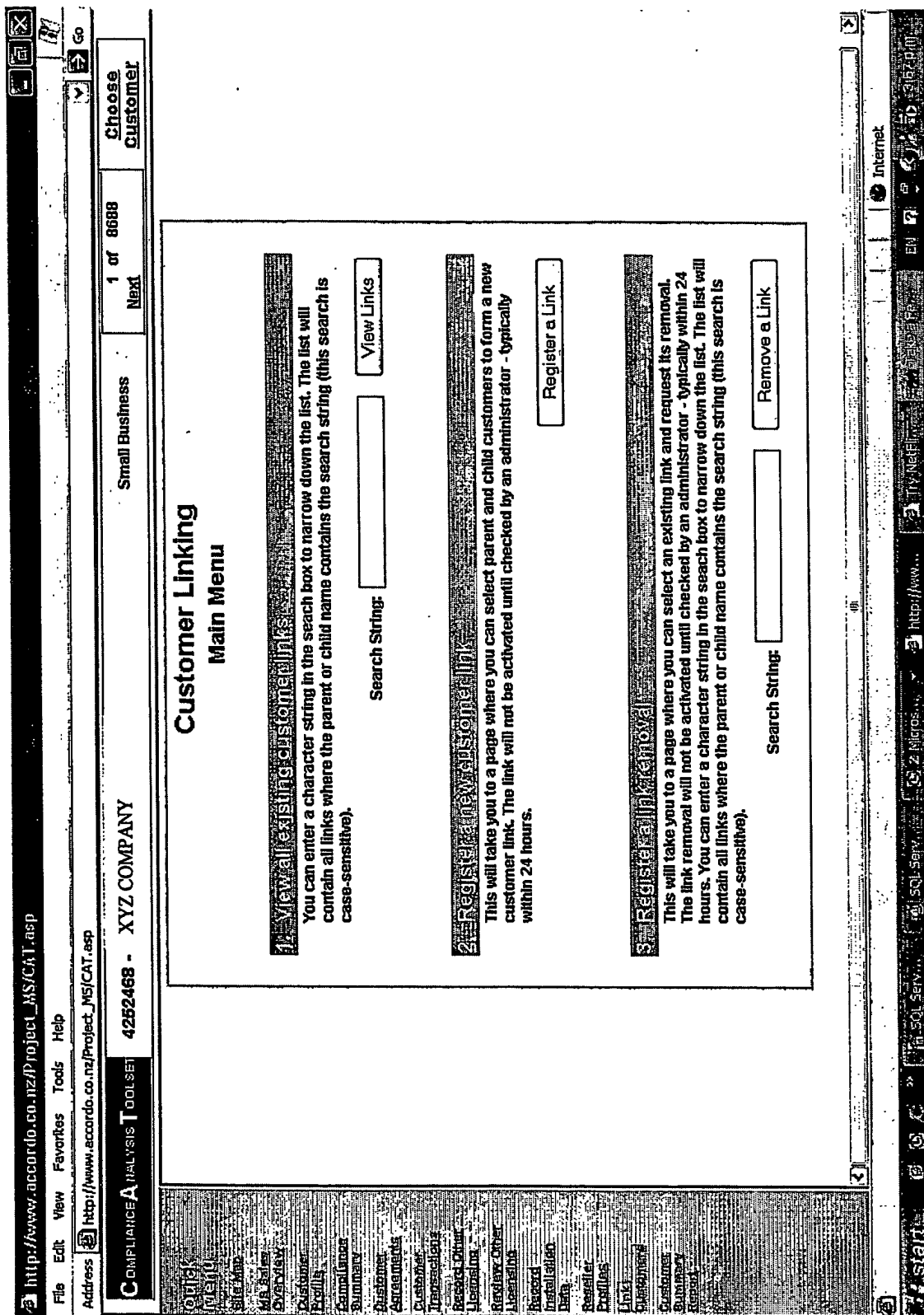
Do you expect to undertake projects in the next 1-2 years which will impact on MS product usage?

Record: 1 2 of 2 (Filtered) Form View

FLTR NJM

Microsoft Access - [Customer Profiling] File Edit View Insert Format Records Tools Window Help Type a question for help

Figure 13



[illegible]

20/32

http://www.accordb.co.nz/Project_MS/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Address http://www.accordb.co.nz/Project_MS/CAT.asp Go WebFarrat Choose Customer

Small Business 1 of 8688 Next

Register a Proposed Customer Link

This screen is divided into two sections. In the left panel you can choose a parent customer, and in the right panel choose a child customer. For each choice, you can use the search tools provided to quickly identify the appropriate customer.

Search for a Parent

Enter a search string in the panel provided to narrow the choice of parent customer. Then choose a parent from the drop-down list at the bottom of the page.

Enter Search String:

Now choose a search mode:

☒ Starts With ☐ Contains ☐ From Here ☐ Show All ☐ With ID

Choose a Parent

Note: Current link status is shown, e.g. 'Not Lkd' means this customer is not currently linked, 'Lkd Pnt' means linked as a parent, 'Lkd Chd' means linked as a child, and 'Lkd P&C' means this customer is a child and also a parent

Search for a Child

Enter a search string in the panel provided to narrow the choice of child customer. Then choose a child from the drop-down list at the bottom of the page.

Enter Search String:

Now choose a search mode:

☒ Starts With ☐ Contains ☐ From Here ☐ Show All ☐ With ID

Choose a Child

Note: Current link status is shown as with 'Choose a Parent'

You must enter your name in the box below and then press the button to review the proposed link...

Done

Internet

http://www... EN http://www... http://www...

2 Windows 7/2 Microsoft

SQL Serv... SQL Serv...

stand

Figure 16

http://www.accordo.co.nz/Project_MS/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://www.accordo.co.nz/Project_MS/CAT.asp

Go

wauferrat

1 of 8888
Next

Choose Customer

COMPLIANCE ANALYSIS TOOLSET

4252468 - 121 XYZ COMPANY

Check Proposed Link

Link proposed by: Wayne Jackson
You are proposing the following link

PARENT 5620913 .A1 Company

CHILD 4252468 -A2 Company

Return without linking

You may record the type of link...

Variation of the parent name

and add any notes relating to this link...

Submit Link

[Quickstart](#)
[Project](#)
[Site Map](#)
[MS Data Overview](#)
[Customer Profile](#)
[Compliance Summary](#)
[Customer Agreements](#)
[Customer Transactions](#)
[Richard Other](#)
[Licenses](#)
[Review Other](#)
[Licenses](#)
[Records](#)
[Installation](#)
[Data](#)
[Referrer](#)
[Profiles](#)
[Link](#)
[Customers](#)
[Customer Summary](#)
[Report](#)

Done

Internet

Agreement Modelling

Microsoft Excel

Type a question for help

A	B	C	D	E	F	G	H	I	J	K	L	M
4	Insert Company Name:											
5												
6	Enter all details in highlighted in red											
7	Allow for Price increase in Year 3 at:											
8	7.0%											
9												
10												
11	Existing # of Seats											
12	Plans during term of agreement											
13	Insert Current Number of Seats:											
14	Initial Position											
15	Estimated Growth in relation to product purchases											
16	Enter details of current ownership positions:											
17	Office (Win & Mac)											
18	Office Pro											
19	Office Std Upgrade to Office Pro											
20	Single App (Access) Up to Office Pro											
21	Systems											
22	Windows 9x											
23	Win NT Vista 4.8											
24	Upgrade to Windows 2000 Professional from Win 9x											
25	Upgrade to Windows 2000 Professional from NT/9x											
26	Win 2000 Pro plus, 625 or PC - 68 recommended											
27	Server CALs											
28	BackOffice CAL											
29	Exchange CAL											
30	NT CAL											
31	SNA CAL											
32	SQL CAL											
33	Site Server CAL											
34	Windows Terminal Server CAL											
35	SNA CAL											
36	Number of SQL Server Clusters Added											
37	Version Upgrade Cycle											
38	Office Std											
39	Office Pro											
40	Windows NT/Windows 2000 Pro											
41	Corporate Details / Summary of Options / Tables for Report / Charts for Report / Tests											

Figure 18A

XYZ Company

Option	Description and Upgrade Schedule	Compliance New Lic	Compliance Mics	Total Compliance	New Lic	Upg Adw/ Ver Upgs	Enterprise Agmt Costs	Supporting Agmt Costs	Total Spend over 3 years
Office Pro, Win 200x, B/O CAL			\$0	\$0	\$11,408	\$549,488	\$1,388,750	\$83,358	\$2,011,005
Option 4 Enterprise Agmt - Office Pro UA on Windows and CALs	Enterprise Agmt - Office only at fixed rate of \$430 Windows and CALs handled as per UA		\$0	\$0	\$0	\$0	\$1,880,825	\$83,358	\$1,924,183
Option 5 Ent Agmt - Office Pro/Win 200x Pro UA on CALs	Enterprise Agmt - Office & Windows at fixed rate of \$588 CALs handled as per UA		\$0	\$0	\$0	\$0	\$200,248	\$799,851	\$1,537,332
Option 6 Ent Agmt - Windows 200x UA on Office and CALs	Enterprise Agmt - Windows only at fixed rate of \$153 Office and CALs handled as per UA		\$0	\$0	\$0	\$0			

XYZ Company

OPTION	Compliance Cost	YEAR 1	YEAR 2	YEAR 3	Total Cost over 3 Years
1 - Select with UA	\$0	\$516,152	\$545,221	\$582,781	\$1,624,154
2 - Select with VIP	\$0	\$433,789	\$59,604	\$895,518	\$1,428,922
3 - EA Full Platform	\$0	\$695,840	\$883,140	\$903,329	\$2,482,108
4 - EA Office	\$0	\$584,048	\$696,640	\$730,318	\$2,011,005
5 - EA Office & Win, UA on CALs	\$0	\$539,840	\$684,180	\$700,094	\$1,824,183
6 - EA Win, UA on Office and CALs	\$0	\$472,044	\$532,771	\$532,518	\$1,537,332

Figure 18B

23/32

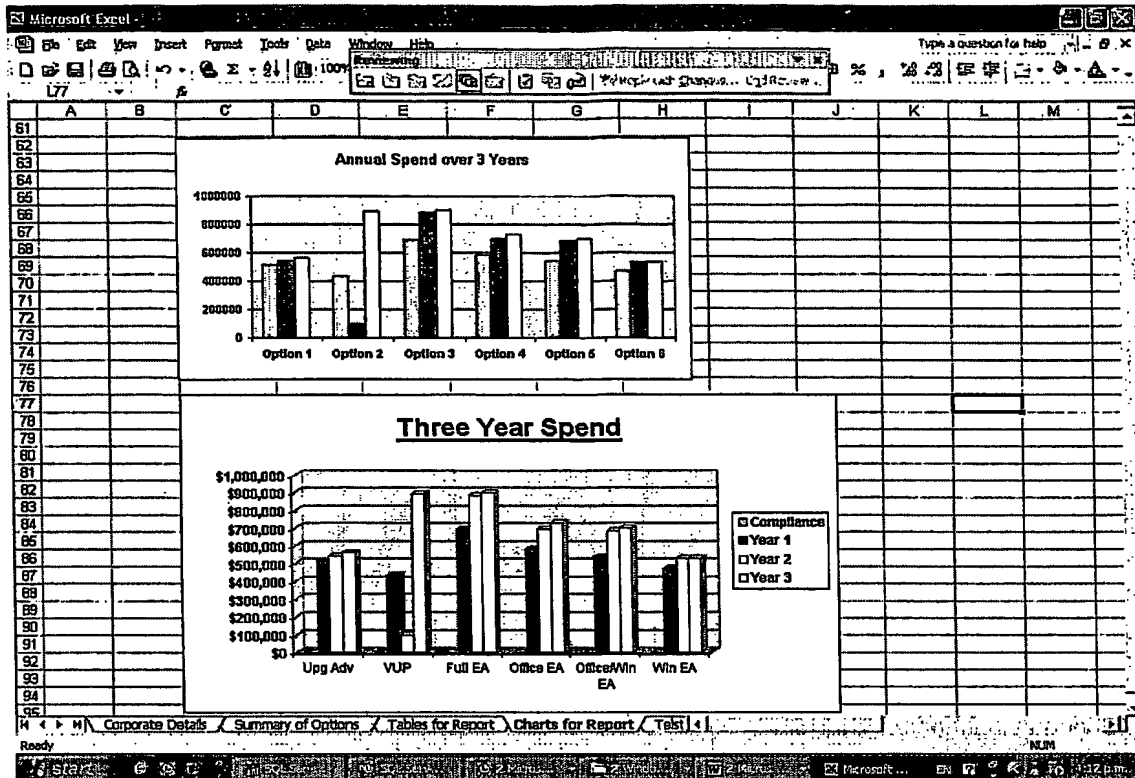


Figure 19A

Microsoft Excel -

XYZ Company

Total Number of Seats: 800

Percentage of Base Installed with Office Pro 78.0%

Percentage of Base Installed with Office Std 18.6%

Percentage of Base with Win NT Wkstn 92.5%

Outstanding Licenses - to be purchased

MS Product Code	Description	Qty Installed	Qty Owned	Qty Required	Price Per	Ext Price
021-02827	Office 2000 Win32 English MVL	148	0	148	\$ 775.00	\$ 115,475.00
269-02409	Office Pro 2000 Win32 English MVL	824	71	553	\$ 831.00	\$ 614,843.00
078-01168	Project 2000 Win32 English VUP MVL	8	0	8	\$ 328.00	\$ 1,888.00
078-01161	Project 2000 Win32 English MVL	83	14	63	\$ 768.00	\$ 48,258.00
088-00187	Visio Standard 2000 Win32 English MVL	43	0	43	\$ 279.00	\$ 11,897.00
659-00253	VStudio Pro 6.0 Win32 English MVL			2	\$ 1,676.00	\$ 3,352.00
238-0742V40VL	WinNT Workstn 4.0 English PUP MVL Win95Win98			285	\$ 368.00	\$ 104,880.00
823-00305	Windows Pro 2000 English PUP MVL			27	\$ 388.00	\$ 9,638.00
381-00933	Exchange CAL 5.5 English MVL			277	\$ 112.00	\$ 31,024.00
312-00803	Exchange Svr 5.5 English MVL			1	\$ 894.00	\$ 894.00
359-00600	SQL CAL 2000 English MVL			8	\$ 303.00	\$ 2,424.00
228-00763	SQL Svr Standard Edtn 2000 English MVL			7	\$ 1,378.00	\$ 9,653.00
2272075ZV40VL	WinNT CAL 4.0 English MVL			27	\$ 68.00	\$ 1,782.00
2273275ZV40VL	WinNT Sw 4.0 English MVL			10	\$ 1,329.00	\$ 13,290.00
Totals						\$ 869,876.00

Microsoft Excel -

Summary of Options / Tables for Report / Charts for Report / Test 1

Figure 19B

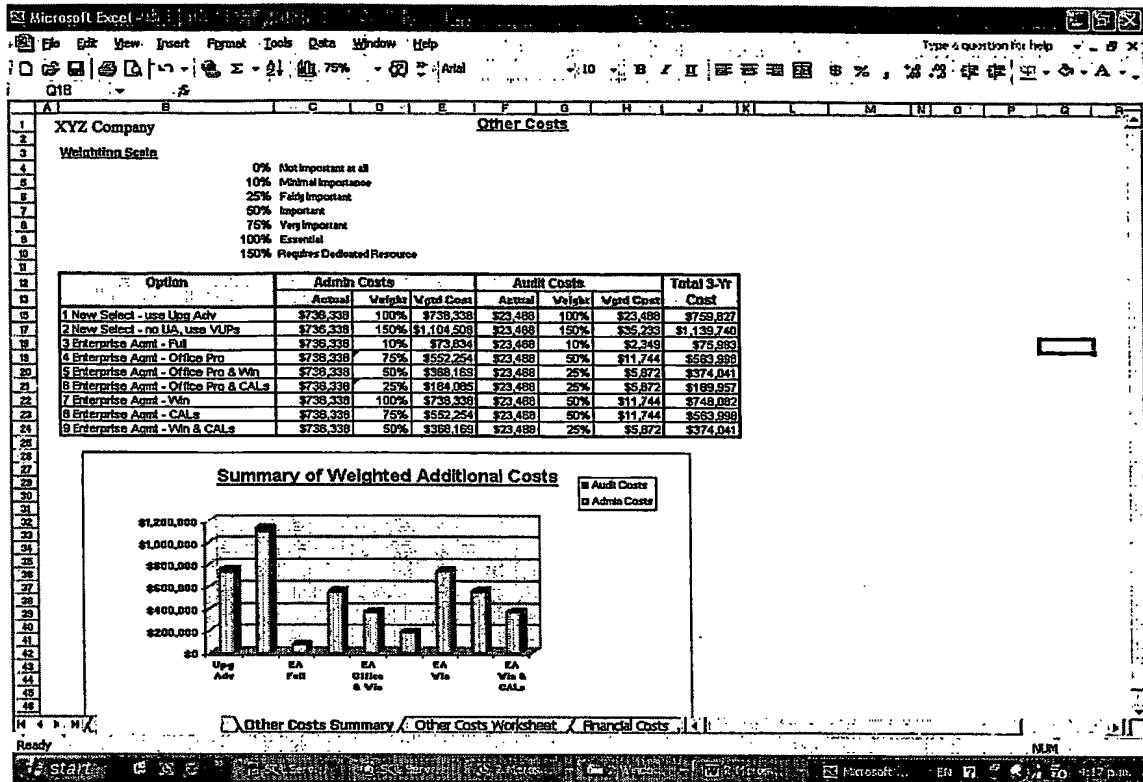


Figure 20A

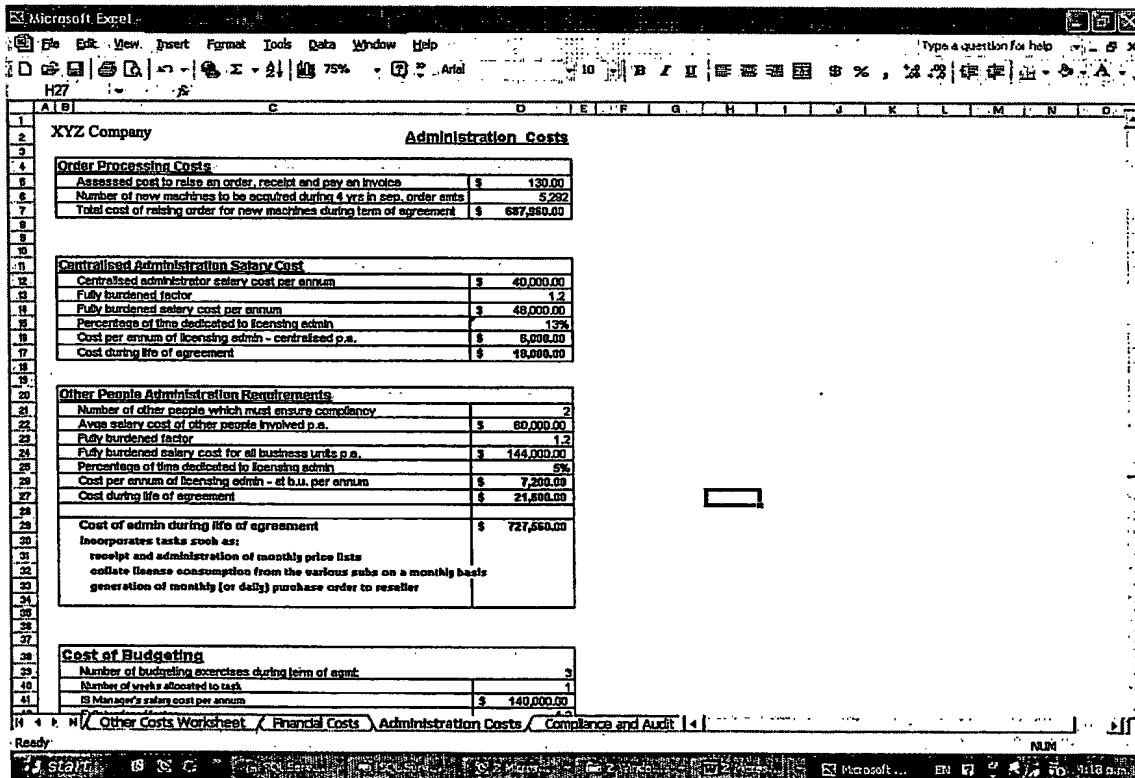


Figure 20B

Microsoft Excel -										
File Edit View Insert Format Tools Data Window Help										
Type a question for help										
100% Arial										
B63										
1	XYZ Company	Purchase under V5 and use MVLP for UA and later Purchases								
2										
3	All prices quoted at retail for comparison							118.000%		
4								Allow for general price increase	18.000%	
5	Upgrade Advantage - Product	Upgrade Adv VLP (2 Year)	Opening Qty	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
6	Office Standard	\$472.00	6092	6092	6092	6092	6092	\$4,571,924	\$1,437,712	\$1,437,712
7	Office Professional	\$265.00	1952	1952	1952	1952	1952	\$1,753,579	\$561,440	\$561,440
8										
9	Windows 95/3.X	\$330.00	0	0	0	0	0	\$0	\$0	\$0
10	Windows NT Workstation	\$330.00	8044	8044	8044	8044	8044	\$4,220,687	\$1,327,260	\$1,327,260
11										
12	BackOffice Client Access	\$237.00	0	0	0	0	0	\$0	\$0	\$0
13	Windows 2000 Client Access	\$41.00	1243	8044	8044	8044	8044	\$524,388	\$164,902	\$164,902
14	Exchange Client Access	\$91.00	551	8044	8044	8044	8044	\$1,163,886	\$366,002	\$366,002
15	SMS Client Access	\$57.00	0	0	0	0	0	\$0	\$0	\$0
16	SQL Server Client Access	\$197.00	650	2011	2011	2011	2011	\$629,906	\$198,084	\$198,084
17	SNA Server Client Access	\$61.00	0	0	0	0	0	\$0	\$0	\$0
18								\$12,864,370	\$4,045,400	\$4,045,400
19										
20										
21										
22	New Purchases - Product		Opening Qty	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
23	Office Standard	\$695.00	0	0	0	0	0	\$0	\$0	\$0
24	Office Professional	\$636.00	0	0	0	0	0	\$0	\$0	\$0
25	Office Std U/g to Office Pro	\$163.00	0	0	0	0	0	\$0	\$0	\$0
26	Single App (Access) U/g to Office Pro	\$361.00	0	0	0	0	0	\$0	\$0	\$0
27										
28	Windows NT Workstation Upgrade	\$338.00	8044	0	0	0	0	\$0	\$0	\$0
29										
30										
31										
32	BackOffice Client Access PUP from SQL	\$251.00	0	0	0	0	0	\$0	\$0	\$0
33	BackOffice Client Access PUP non SQL	\$314.00	0	0	0	0	0	\$0	\$0	\$0
34	General Work at Home V5 & UA / V5 & VUPs / OLP (Do Nothing) / EA R4 Flat / EA R4									
35										

Figure 21

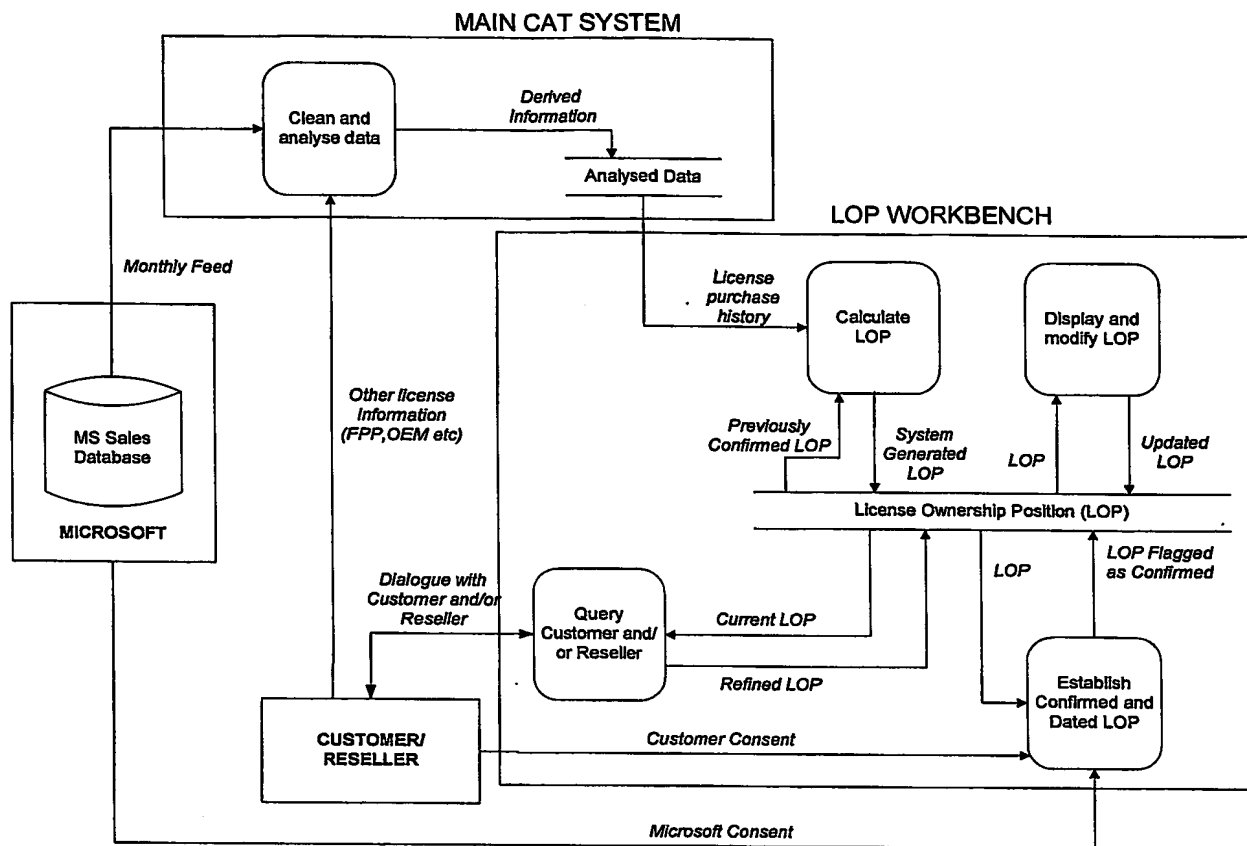


Figure 22

27/32

http://accpower/CAT_aus/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Search Favorites Media

Address http://accpower/CAT_aus/CAT.asp

COMPLIANCE ANALYSIS TOOL SET 557714 - XYZ COMPANY 1 of 20857 Next Choose Customer

Customer Compliance Report

Choose Segment(s) to Include:

☒ Small Business
☒ Low Mid-Market
☐ Corporate
☐ Major

Other Selection Criteria:

Include organizations with transactions, live or expiring agreements in last months

Select Risk Factors and Assign Weightings (0 = no weighting 10 = max weighting)

	0	1	2	3	4	5	6	7	8	9	10
Inconsistent totals on enterprise-wide products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Estimated non-compliance on key products (\$)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Upgrades and maintenance with no identifiable base	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Version management - mixed or aging versions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of multiple resellers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Rank the list in order of:

Sort by estimated dollar value

Specify Number of Customers to Display:

Show Top...

Choose Segment(s) to Include:

☒ Small Business
☒ Low Mid-Market
☐ Corporate
☐ Major

Other Selection Criteria:

Include organizations with transactions, live or expiring agreements in last months

Select Risk Factors and Assign Weightings (0 = no weighting 10 = max weighting)

	0	1	2	3	4	5	6	7	8	9	10
Inconsistent totals on enterprise-wide products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Estimated non-compliance on key products (\$)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Upgrades and maintenance with no identifiable base	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Version management - mixed or aging versions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of multiple resellers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Rank the list in order of:

Sort by estimated dollar value

Specify Number of Customers to Display:

Show Top...

http://accpower/CAT_aus/Compliance_Menu.asp

Start

Figure 23

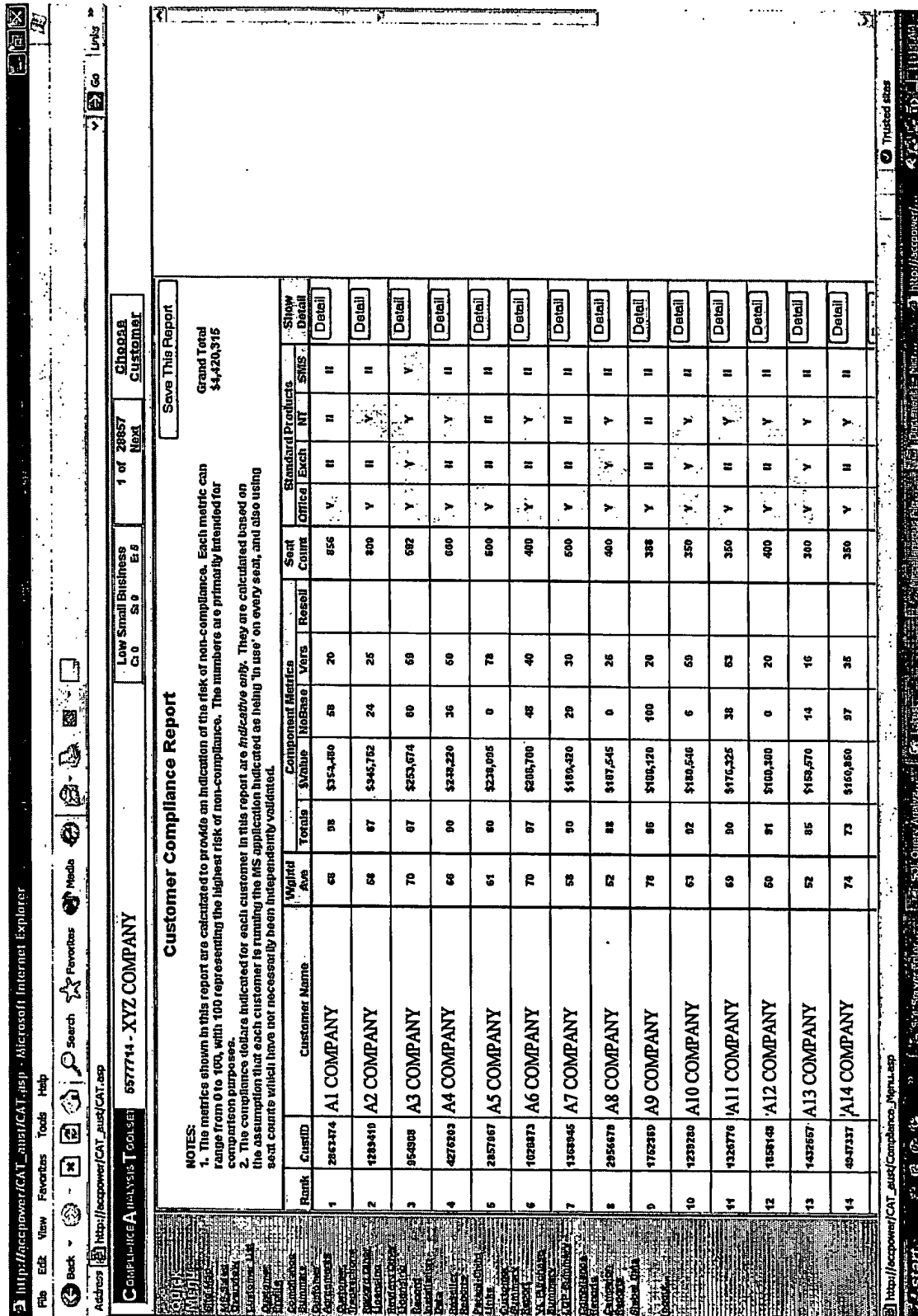


Figure 24

Figure 25

30/32

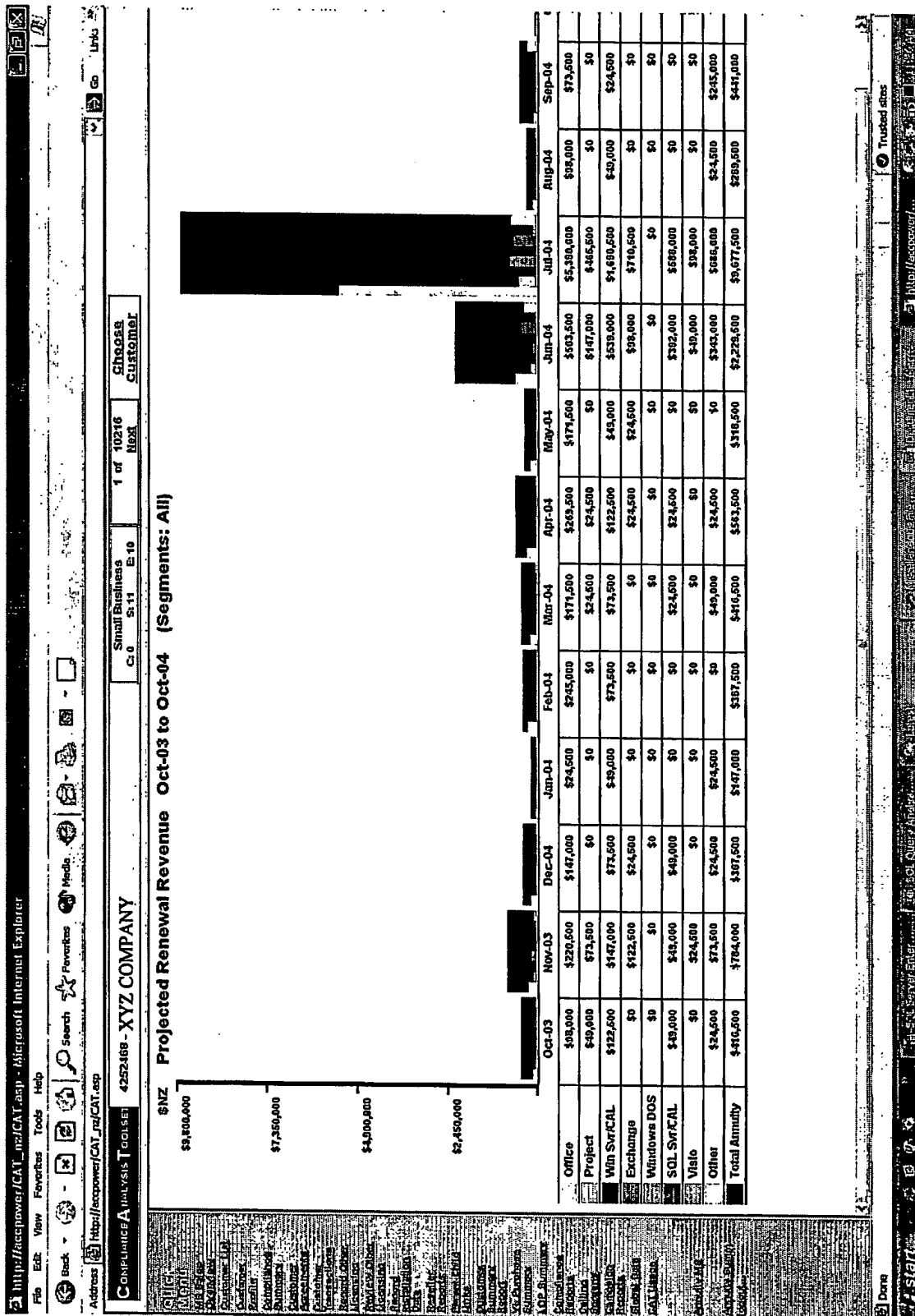


Figure 26

31/32

http://accpower/CAT_mjz/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Home

Address http://accpower/CAT_mjz/CAT.asp

Company: XYZ COMPANY

Small Business C.O. 1 of 10216 10/21/2003

Customer: CHOOBA

Annuity Customer Report

Choose Type of Report

☒ Summary Report (Shows Expiry Date, Customer Name, Segment and Revenue)

☐ Detailed Report (Shows individual annuity transactions and agreement details)

Choose Date Range

Agreement to expire between (inclusive): Month Year and Month Year

October 2003 and October 2003

Choose Type of Annuity Program and License

License Program: ☒ Open ☒ Select

License Type: ☐ LISA ☐ Maintenance ☐ SA Only ☒ All Annuity ☐ Upgrade Adv

Choose Customer Set

☒ All Segments

☐ Low Small Business ☐ Lower Mid-Market ☐ Corporate

☐ Core Small Business ☐ Core Mid-Market ☐ Major

☐ Small Business ☐ Upper Mid-Market ☐ Strategic

Seat Count: Between 0 and 99999

Choose Product Set

☒ All Products

☐ Applications ☐ Office ☐ Windows Svr/CAL

☐ Server ☐ Project ☐ Exchange Svr/CAL

☐ Systems ☐ Video ☐ SQL Svr/CAL

Choose Rank Order

Rank By: ☒ Expiry Date ☐ Customer Name ☐ Segment ☐ Revenue ☐ Reseller ☐ Product

Then By: ☐ Expiry Date ☐ Customer Name ☐ Segment ☐ Revenue ☐ Reseller ☐ Product

Show Report Reset All

Done

Figure 27

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http://accpower/CAT_pr/CAT.asp - Microsoft Internet Explorer									
File	Edit	View	Favorites	Tools	Help	Back	Forward	Search	Media
Address: http://accpower/CAT_pr/CAT.asp									
COMPLIANCE ANALYSIS TOOLSET 4252468 - 121 AGENT XYZ COMPANY									
Small Business C:0 S:11 E:10 1 of 10216 Next Choose Customer									
Annuity Customer Report									
Expiry Date	Customer Name	MS Sales ID	Segment	Qty	Product Name	Revenue	Program License Type	Reseller	Agreement ID Master No.
28-Oct-03	A1 Company	019743	Corporate	200	SOL CAL	\$11,230	Solera3 Upgrade Advantage		52160328
28-Oct-03	A1 Company	019743	Corporate	50	Project	\$10,778	Solera4 Upgrade Advantage		52160328
28-Oct-03	A1 Company	019743	Corporate	200	Windows IIT CAL	\$2,200	Solera4 Upgrade Advantage		52160328
28-Oct-03	A1 Company	019743	Corporate	2	SQL Server Standard Edition	\$513	Solera4 Upgrade Advantage		52160328
28-Oct-03	A1 Company	019743	Corporate	2	Windows IIT Server	\$454	Solera4 Upgrade Advantage		52160328
28-Oct-03	A1 Company	019743	Corporate	1	Exchange Server - Standard Edition	\$280	Solera4 Upgrade Advantage		52160328
28-Oct-03	A1 Company	019743	Corporate	1	Virtual C++ Professional	\$206	Solera4 Upgrade Advantage		52160328
31-Oct-03	A2 Company	4501637	Small Business	3	Windows 2000 Server	\$681	Open Upgrade Advantage		0114255787
31-Oct-03	A3 Company	5077012	Small Business	2	Project	\$431	Open Upgrade Advantage		142008482250310
31-Oct-03	A3 Company	5077012	Small Business	10	Windows 2000 Terminal Services CAL	\$308	Open License/Software Assurance Pack		0114255787
31-Oct-03	A3 Company	5077012	Small Business	1	Windows 2000 Server	\$227	Open License/Software Assurance		142132162250310
31-Oct-03	A4 Company	4016142	Small Business	19	Office	\$3,127	Open Upgrade Advantage		0114232211
31-Oct-03	A4 Company	4016142	Small Business	6	Office Professional	\$1,223	Open Upgrade Advantage		0114232211
31-Oct-03	A5 Company	2333653	Small Business	5	Windows 2000 Terminal Services CAL	\$154	Open Software Assurance		142008482250310
31-Oct-03	A5 Company	2333653	Small Business	6	Exchange CAL	\$129	Open Software Assurance		0114276973
31-Oct-03	A5 Company	2333653	Small Business	6	Windows 2000 CAL	\$55	Open Software Assurance		0114276973
31-Oct-03	A5 Company	2333653	Small Business	-5	Windows 2000 CAL	(\$55)	Open Software Assurance		0114276973
31-Oct-03	A5 Company	2333653	Small Business	-5	Exchange CAL	(\$129)	Open Software Assurance		0114276973
31-Oct-03	A5 Company	2333653	Small Business	-5	Windows 2000 Terminal Services CAL	(\$140)	Open Software Assurance		0114276973
31-Oct-03	A6 Company	2531267	Core Mid-Market	1	Windows XP Professional	\$93	Open Upgrade/Software Assurance Pack		0114240003
31-Oct-03	A7 Company	4780547	Core Mid-Market	1	SQL Server Standard Edition	\$257	Open Software Assurance		142261032250310
31-Oct-03	A7 Company	4780547	Core Mid-Market	1	SQL Server Standard Edition	\$257	Open Software Assurance		142261032250310
31-Oct-03	A7 Company	4780547	Core Mid-Market	1	Windows 2000 Server	\$227	Open Upgrade Advantage		0114273486

Figure 28

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